

SESSION 3 OF 8

Relata, the client portal



What it is and how it works.

10:15-11:00



Will Writer Pro

What is Relata?



A client portal, built into Will Writer Pro.

Independently branded from Will Writer Pro, your clients see your name on it, your contact details and not ours.

(we don't want your clients knowing all your secrets, do we? 😊)

Everything you and your client need to exchange, lives in one secure place.

1

Secure messaging

Every conversation with your client in one place, documented.

2

Terms and info packs

Sent with a timestamped record of receipt and agreement.

3

Client address book

The client enters names and addresses themselves, exactly as they mean them.

4

Draft approval online

Client reviews, flags corrections and approves. Print-ready documents then re-generated.

5

Invoices and payment

Raise the invoice in Will Writer Pro; the client pays by card via Stripe.

6

Files and tasks

Share documents securely and set the client tasks, such as uploading ID.

Why does it exist?



The problem with email

- Email is inherently insecure. Once it leaves your outbox you have no control over where it goes.
- Most attachments are sent with no password protection at all: draft wills, ID, financial details.
- Messages get lost in spam, buried in threads or forwarded on. There is no reliable audit trail.
- A PDF attached to a Gmail doesn't feel like professional fees' worth of service.

What Relata gives you

Far more secure. Documents stay inside a login-protected portal, never in an inbox.

A professional approach. The big corporates already do this in banking, insurance and conveyancing. Now independent will writers can too.

The client does more of the work. Names, addresses, ID and approvals come from them, correctly, first time.

Less admin for you. Most clients can self-serve, so fewer phone calls, fewer re-drafts and less chasing.

How do you set it up?



Set it up once, at company level, and it's ready for every client you switch on. We'll show you the screens in the live demo in a moment. The company-level set-up gives you two things:

1 Default documents

Sent to every client automatically when their portal is switched on, such as:

- Terms of business
- Rate card
- Company brochure
- 'What to expect on the day'

2 Default tasks

A to-do list for the client, so they know exactly what you need from them, for example:

- Read and accept the terms and conditions
- Populate the address book
- Upload ID documents

When is it set up?



A portal isn't for every client

- Some clients won't want one: elderly clients, clients with a disability, or anyone who simply doesn't do technology.
- Many more will expect one. Online banking, GP apps and conveyancing portals have made this the norm.
- So Relata is a per-client arrangement. You know your client best, and you decide who gets a portal.

Switch it on whenever suits the client



When the appointment is booked

So the client can read your terms and fill in the address book before you meet.



When the case is created

Once you've met and know a portal will work for them.



Any time you think it's right

It's flexible. Switch it on later in the process if that suits the client better.

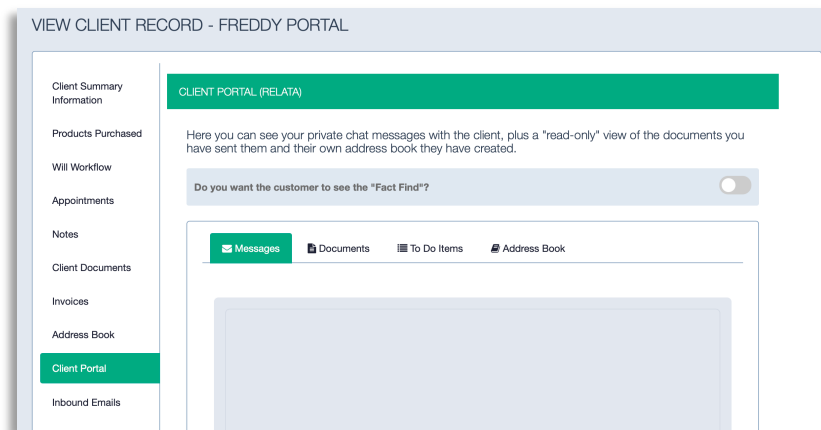
Where is it?



For you

The client record screen

Everything for that client, from your side, is in one place in Will Writer Pro: the portal switch, the documents you've sent, the tasks they've completed and the messages between you.



For your client

relata.co.uk

One web address, on any device. Your client logs in, sees your company name & contact details, and finds their messages, documents, tasks and invoices waiting for them.

Information flow



Will Writer Pro ↔ Relata

Same secure server. Data never leaves the system.

Email to the client

"You've got mail" only. Nothing else.

1	Account set-up	You create the account. Any default documents and tasks are sent to the client at the same time.	Account created. Temporary password, changed on first login.
2	Address book	Client adds names, addresses, dates of birth and relationships before you meet. They appear under the Address Book button on your forms.	—
3	Fact find	Optional, per client. Guardians, executors and gifts they already know about feed into the instruction form. Still editable at drafting.	Invitation to complete the fact find.
4	Upload documents	Set the client a task to upload ID, proof of address, previous wills, photos of jewellery or other items they want to gift.	You have a new task.
5	Appointments	Create the appointment in Will Writer Pro and the details appear in the client's portal.	An appointment has been booked. Log in to view it.
6	Messaging	Secure messaging, not live chat (though it looks like it). A bell at the top right of Will Writer Pro alerts you to any client action.	You have a new message.
7	Sending documents	Send documents and invoices from Will Writer Pro straight into the client's Relata account. They log in to download them.	You have new documents.

**ENOUGH TALKING...
SHOW ME RELATA!**



Future enhancements



Relata is never finished. We're developing it all the time, and this is some of what's in the pipeline. As always, tell us what would make the biggest difference to your business.

1

More invoice payment options

Beyond card via Stripe

- More ways for clients to pay from inside the portal
- Keeps the whole transaction within the system

2

Customisable fact finds

The right questions for each service

- Different fact finds for Wills, LPAs, lifetime trusts and financial products
- Choose which one each client receives

3

Closer workflow integration

Part of your process, not beside it

- Automatic workflow reminders
- Broadcast messaging
- Third-party triggers, e.g. the national will register

ANY QUESTIONS?

Or is it time to stretch your legs and
hunt down more **biscuits and caffeine?**

